

Tax Assistance Program at Presidio of Monterey

1. The tax season is rapidly approaching. To assist our service members, the Legal Assistance Branch of the Office of the Staff Judge Advocate will conduct a Tax Assistance Program (TAP) for active duty service members and their families. The TAP will again include electronic filing of federal returns.
2. In order that service members may be assisted at their units, each company size unit or detachment will designate one or more persons to act as Unit Tax Advisors (UTAs) during the tax season. Names of those nominated will be submitted to the Office of the Staff Judge Advocate, Legal Assistance Office (LAO), ATTN: Mr. Kolowski 242-5083 (fax 242-6392), by COB 10 December. Early appointments will enable UTAs to receive training on tax preparation software which will be provided by the LAO.
3. Beginning in late January, the LAO, in coordination with the Internal Revenue Service (IRS) and the California Franchise Tax Board (FTB), will conduct a 70-hour Volunteer Income Tax Assistance (VITA) course of instruction for UTAs. It is scheduled for 22-26 January and 29 January–2 February. Attendance by UTAs at all seven scheduled days of instruction is mandatory. All classes will be held at computer lab #21, building 610, room 329, Presidio of Monterey. Training will start at 0800-1600 each day.
4. The VITA course will provide UTAs with the knowledge and practical experience needed to prepare most service members' federal and state tax returns. UTAs who attend and pass the course will be responsible during the tax season for assisting members of their respective units in completing their tax returns.
5. UTAs will be E-4 or above, unless a junior service member already possesses special expertise in tax preparation. UTAs must be available at their unit through the entire tax season which will end 15 April. Guidance from HQDA emphasizes the role of UTAs in a successful TAP. Commanders at every level must ensure that UTAs are given the time and support necessary to perform this important task. Select good people, let them know you want a good program, then help them to help our service members. Ensuring that every service member's taxes are filed accurately and on time improves the morale and readiness of a unit.
6. Service members will be first directed to contact their UTA for tax assistance. When the problem is too complex for the UTA, the UTA will consult with the LAO for assistance. Federal and state forms will be provided to UTAs based on their unit members' needs.
7. Call the Legal Assistance Office at 242-5083 for more information.